

Salesforce CRM

Delegated Authority Solution

If you are an MGA, Syndicate or Insurers interested in Coverholder, TPA onboarding, due diligence, binders, MTAs and want...

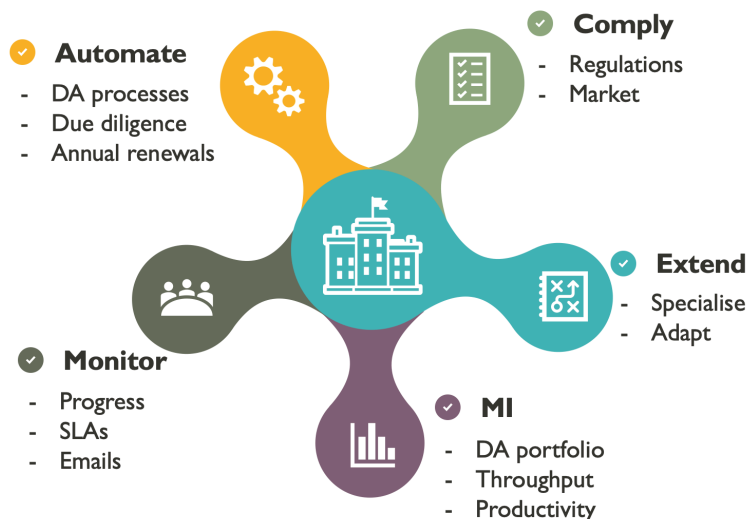
Better Compliance

Faster Time to Market

Reduced Errors and Omissions

Less Effort

...then you should consider Delegated Authority Solution



Solution Details

Coverholder onboarding, approvals and maintenance

TPA onboarding, approvals and maintenance

Binder approvals, renewals, mid-term adjustments

Due diligence to create multi-dimensional risk profile

Automated processing

Features / Benefits

Built on Salesforce Sales Cloud platform

Customisable to customer DA processes

Configurable by Business

Cyclical processing, regulatory compliance

Dashboard Reports for Insights & Decisions

No upfront infrastructure investment

The Delegated Authority Solutions helps manage coverholder and TPA onboarding, binder creation and renewals, mid-term adjustments, task scheduling, SLA tracking, reports and dashboards, multi-dimensional risk profile via a highly configurable due diligence module.

The solution is highly data driven which enables it to be configured to meet specific processing and compliance needs without needing a software release. Additional features such as email drafting & tracking, document generation, contact management can be easily built based on the customer's requirements.

The solution can also be extended to include regulatory compliance and audit scheduling, auditing, actions tracking and completion, data retention etc.

For further details or to discuss our Delegated Authority Solution, please contact Will Sturt at +44 7453899528 or will.sturt@processthreesixty.com